



MT Votes January 2016 Release

2016 Election Administrator Certification Training

Montana Secretary of State Linda McCulloch

Elections and Government Services

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Voter Registration

Resync Functionality

What is Resync:

- Information is “**in sync**” when it **agrees**.
- If you update a voter's information after they were issued a ballot for an election, the information on the voter's record **dis**agrees with the information that was used to create the voter's ballot. The new information is **not in sync** with the ballot information for the election.
- A “**resync**” applies the voter's new information to the election, by creating a new ballot for that voter.

Resync Functionality

What is Resync:

Voter Information

Voter Registration
Voter Print Elections Petitions Imaging Address

Voter record successfully saved, Voter number is 450146854 [Help](#)

New Save Clear Search Process Batch

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

Standard [NCOA](#) CASS Migration Election
Comments Worker Clear

House # Suffix Pre Dir Street Name Type
22 S HOBACK ST

Post Dir Unit Type

City/St/Zip HELENA MT 59601

County LEWIS & CLARK Precinct PCT 08 Split P08.1

Mailing
Country UNITED STATES OF AMERICA ☒ USA Clear
Address
City/St/Zip

Active/Sent

Registration Misc Info Custom Duplicate Req. Undeliverable

Party No Party Last Verified Date 01/22/2016

Status Active - A ☐ MVD Verified

Reason ☒ SSA Verified

Source of Registration In person - 06 Verify

Old Voter ID County Reg Date 01/22/2016

Vote Eligible 01/03/2016 Last Voted Date

☐ No Signature ☐ Confidential ☒ US Citizen

Comments

Voter Polling Locations

Precinct P08 - PCT 08 [View Image](#)

Split P08.1

Polling Place CIVIC CENTER BALLROOM


Election

Election	Late Reg Date	Date	Polling Places
TEST SCHOOL VBM E...	01/03/2016	01/22/2016	CIVIC CENTER BALLROC
TEST PRIMARY POLL ...	01/18/2016	01/29/2016	CIVIC CENTER BALLROC
Fed Prim Test - Poll LC	05/22/2016	06/07/2016	CIVIC CENTER BALLROC

Districts

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 42	Senate District 42
HOUSE DISTRICT	HD 083	House District 83
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
COMMUNITY COUN...	NCD2	Neighborhood Council District #2

Ballot Information

 453832246
PCT 08

JUSTIN R TIMBERLAKE
22 S HOBACK ST
HELENA , MT 59601

P08
1409

Resync Functionality

What is Resync:

Voter Registration

Voter Print Elections Petitions Imaging Address

[Help](#)

New Save Clear Search Process Batch

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

1234 01/31/1981 34 TIMBERLAKE JUSTIN R

Residence Absentee Contacts History Voting History

Standard NCOA CASS Migration Election
Comments Worker Clear

House # Suffix Pre Dir Street Name Type

413 8TH AVE

Post Dir Unit Type

City/St/Zip HELENA MT 59601

County LEWIS & CLARK Precinct PCT 17 Split P17.1

Mailing

Country UNITED STATES OF AMERICA ☒ USA Clear

Address

City/St/Zip

Active/Sent

Registration Misc Info Custom Duplicate Reg. Undeliverable

Party No Party Last Verified Date 01/22/2016

Status Active - A ☐ MVD Verified

Reason ☒ SSA Verified

Source of Registration In person - 06 Verify

Old Voter ID County Reg Date 01/22/2016

Vote Eligible 01/03/2016 Last Voted Date

☐ No Signature ☐ Confidential Reveal ☒ US Citizen

Comments

Voter Polling Locations

Precinct

Split

Polling Place JUSTIN R TIMBERLAKE
22 S HOBACK ST
HELENA, MT 59601

P08
1409

Districts

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 42	Senate District 42
HOUSE DISTRICT	HD 083	House District 83
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
COMMUNITY COUN...	NCD2	Neighborhood Council District #2

Resync Functionality

Resync Issue:

- Previously, a lot of resyncs happened behind the scenes in MT Votes.
- Sometimes these resyncs resulted in a voided ballot, even though the user did not intend to void a ballot.

Resync Functionality

Resync Solution:

Recent enhancements to MT Votes give you more control over the resync. On your end, you will see a resync pop-up box, asking if you would like to resync the voter's information for one or more elections.

Resync Functionality

What's the pop-up look like?:

Election Update

[Voter Search](#) [Help](#)

Voter information has been changed. Would you like to resync this voter's information for the following election(s)? If you answer YES it will void their current active ballot and reissue a new ballot for the selected election(s).

[Select All](#) [Unselect All](#)

	Election Date	Election
<input type="checkbox"/>	01/22/2016	TEST SCHOOL VBM ELECTION

Once updated, information can not be rolled back

[Yes](#) [No](#)

Resync Functionality

When will the resync box pop?:

Whenever you update a voter's key information (name, residence, mailing address, absentee address), AND the voter has a ballot in one of the following stages:

- Sent
- Undeliverable
- Resent
- Void

When does the resync not pop?:

The voter does not have a ballot for any election, or the voter's ballot is in one of the following stages:

- Prepared*
- Accepted
- Rejected

*If a voter has a prepared ballot and you update that voter's key information, the prepared ballot will automatically be updated with that information.

Other thoughts on Resync...

I think of the resync pop-up appearing anytime you have already *issued* the voter a ballot for an ongoing election, and you change information on that voter's record that you may or may not want to apply for the ongoing election.

How do I know if I want to Resync?

- If you need to void the voter's ballot and reissue a new one, the answer to the Resync is

YES

- If you do not want to void the voter's ballot and reissue a new one, the answer to the Resync is

NO

Questions to Consider before Answering Yes or No to Resync

- What type of application did I receive?
 - Voter Registration Card
 - Absentee Request
 - Undeliverable Confirmation Notice
- Who did I receive the application from?
 - Regular Registrant
 - Late Registrant
 - UOCAVA registrant
- When did I receive the application?
 - Before or after the close of registration
 - Before or after the deadline to issue absentees
- How did I receive the application?
 - In person
 - By mail
 - Other
- What type of information is changing?
 - Residence address change (must be made in person after the close)
 - Mailing/absentee address change

Resync Functionality

Scenario 1:

- It is before the close of registration for a Fire District Election. Your judges are stuffing ballots for the election, which means you have printed labels in MT Votes and ballots are in Active/Sent stage. (Just in MT Votes, you have not actually sent ballots to voters yet.)
- You receive a registration card from one of the voter's in the Fire District. The registration card indicates a new residence address.
- Do you answer Yes or No to the resync?

Resync Functionality

Scenario 1 Solution:

- YES
- You would answer Yes to the resync because you received the registration card before the close of regular registration.
- Note: the judges are already stuffing a ballot for this voter under the voter's old information. That ballot will have to be pulled out and voided.

Resync Functionality

Scenario 2 :

- It is past the close of regular registration for the School Mail Ballot Election you are conducting.
- You receive a card in the mail with a residence address change for a voter who was already sent a school ballot at their old residence.
- Do you answer Yes or No to the resync?

Resync Functionality

Scenario 2 Solution:

- NO
- Because it is past the close of regular registration for the school election, and this voter did not appear in person to late register for the school election, the address update may only be applied to future elections.
- Note: You may want to attempt to contact the voter to give them options for voting in the school election.

Resync Functionality

Scenario 3 :

- We are in the period of late registration for a School Mail Ballot Election that our office is conducting. A temp gets the resync pop-up and asks what to do.
- You find out that the voter came in with a voted ballot for the school election, sealed in the signed affirmation envelope. The voter was working with your temp to update their residence address to make sure it is correct for the Primary.
- Do you answer Yes or No to the Resync?

Resync Functionality

Scenario 3 Solution :

- It depends.
- In this case, I would give the voter the option to return the voted ballot they brought in, or get a new school ballot under their new address.
- Voter requests new ballot under new address:
 - Yes to resync
 - Note: You would take the ballot they brought in and mark it void. The voter's status would be late registration for the school election.
- Voter wants to use the ballot they already voted:
 - No to resync
 - Note: Since the voter was not updating their address and getting a ballot for the school election, they are not a late registrant. They are updating their registration as a regular registrant for the next election.

Resync Functionality

Scenario 4:

- A ballot for a vote by mail election comes back undeliverable. The voter returns the undeliverable confirmation notice, indicating a new residence address.
- Do you answer YES or NO to the Resync?

Resync Functionality

Scenario 4 Solution:

- NO
- In this case, you would reSEND the ballot to the voter through the issue ballots screen.

Voter Registration

Situation:

With the passing of HB84 the Secretary of State is required to prescribe a form that can verify an elector's late registration status for a school election.

In discussion with METAC we designed the Certificate of Late Registration, which is available in MT Votes. This was actually implemented in the September METAC release, and updated in this release.

Voter Registration

Changes:

The biggest changes to this form were to include:

- Type of Late Registration
- Previous County/Precinct
- Previous School District information
- New School District information

You can only print this certificate if the voter is in Late Registration status. It is available from the voter record in the Print menu.

<u>CERTIFICATE OF LATE REGISTRATION</u>	
Type of Late Registration: Precinct to Precinct	
Previous Precinct: PCT 08	Current Precinct: PCT 17
District Name SCHOOL DISTRICT 1 ELEMENTARY SCHOOL DISTRICT 1 HIGH SCHOOL	District Name SCHOOL DISTRICT 1 ELEMENTARY SCHOOL DISTRICT 1 HIGH SCHOOL
Lewis & Clark County Montana Election Administrator	316 N PARK ROOM 168 HELENA, MT 59623
The undersigned election administrator in and for the county and state aforesaid, does hereby certify that	
TEST CERTIFICATE REG	
Residence Address 825 8TH AVE HELENA, MT 59601	Mailing Address
Is a duly qualified elector of this county, Registration Number 450146833:	
County Registration Date: 01/11/2016	
State Registration Date: 01/11/2016	
Date of Birth: 01/01/1994	
Voter Signature	
In witness hereof, I have hereunto set my hand and affixed my official seal on this 11 day of January 2016.	
SEAL	Paulette DeHart Election Administrator
	By Deputy

Voter Registration

Changes:
You can find the certificate of Late Registration under the print menu in Voter Registration.

The Voter **MUST** be in Late Registration status.

Voter Registration

Voter Print Elections Petitions Imaging Address

Print Menu:

- Current Image
- Voter Confirmation Card
- Pre-Fill Signature Card
- Undeliverable Confirmation Notice
- Voter Profile
- Certificate of Registration
- Certificate of Late Registration**
- Voter Label

Registration Information:

Birth Date: 01/22/1980 Age: 36 Gender: [Dropdown] Last Name: SJOLUND First Name: CASEY MI: L Suffix: [Dropdown]

Voting History:

Election Worker: [Dropdown] Type: AVE

Voter Polling Locations:

Precinct: P06 - PCT 06 Split: P06.4 Polling Place: EXHIBIT BLDG-ENTRY HALL-FAIRGROUNDS

Election:

Election	Late Reg Date	Date	Polling Places
TEST SCHOOL VBM E...	01/03/2016	01/22/2016	EXHIBIT BLDG-ENTRY H...
TEST PRIMARY POLL ...	01/18/2016	01/29/2016	EXHIBIT BLDG-ENTRY H...
Fed Prim Test - Poll LC	05/22/2016	06/07/2016	EXHIBIT BLDG-ENTRY H...

Districts:

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri...
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 40	Senate District 40
HOUSE DISTRICT	HD 079	House District 79
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
CITYWIDE	01	CITY OF HELENA

Registration Tab:

Party: No Party Last Verified Date: 10/02/2008

Status: Late Registration - LR MVD Verified: [X] SSA Verified: []

Reason: Precinct to Precinct - LP

Source of Registration: Mail - 07

Old Voter ID: [] County Reg Date: 01/12/2016

Vote Eligible: 10/02/2008 Last Voted Date: 06/18/2015

[] No Signature [] Confidential [] US Citizen

Comments:

under penalty of perjury that the information on this application is true, the
sa, that I am not serving a felony conviction in a penal institution nor have I
even false information on this application, I may be subject to a fine or impi

Ballot Audit Log

Reported Issue:

The Ballot Audit Log lacks adequate information about a ballot, and the current search features are not necessary. One big issue is that this log only appears to track certain instances of what happens to a ballot.

Ballot Audit Log

Solution:

The ballot audit log received a complete makeover. It will now track every change that a ballot goes through. You can also now search by Election OR Ballot ID.

[illegible]

Ballot Audit Log

Solution:

You can access the ballot through the voter record under the Voter Menu item.

The screenshot displays the 'Voter Registration' application window. The 'Audit Log' menu is open, showing options like 'Ballot Audit Log', 'Voter Moves', and 'Linked Non Duplicate Voter'. The main form shows voter details for Casey SJOLUND, born 01/22/1980, residing in Lewis & Clark County, Precinct PCT 06. The 'Active/Sent' section shows registration details, including 'Late Registration - LR' status and 'MVD Verified' checkbox. The 'Election' table lists upcoming tests and the 'Districts' table lists various district types and codes. A signature is visible at the bottom.

Election	Late Reg Date	Date	Polling Places
TEST SCHOOL VBM E...	01/03/2016	01/22/2016	EXHIBIT BLDG-ENTRY H/
TEST PRIMARY POLL ...	01/18/2016	01/29/2016	EXHIBIT BLDG-ENTRY H/
Fed Prim Test - Poll LC	05/22/2016	06/07/2016	EXHIBIT BLDG-ENTRY H/

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 40	Senate District 40
HOUSE DISTRICT	HD 079	House District 79
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
CITYWIDE	01	CITY OF HELENA
COMMUNITY COUN...	NCB4	Neighborhood Council District #4

Absentee Tab

Situation:

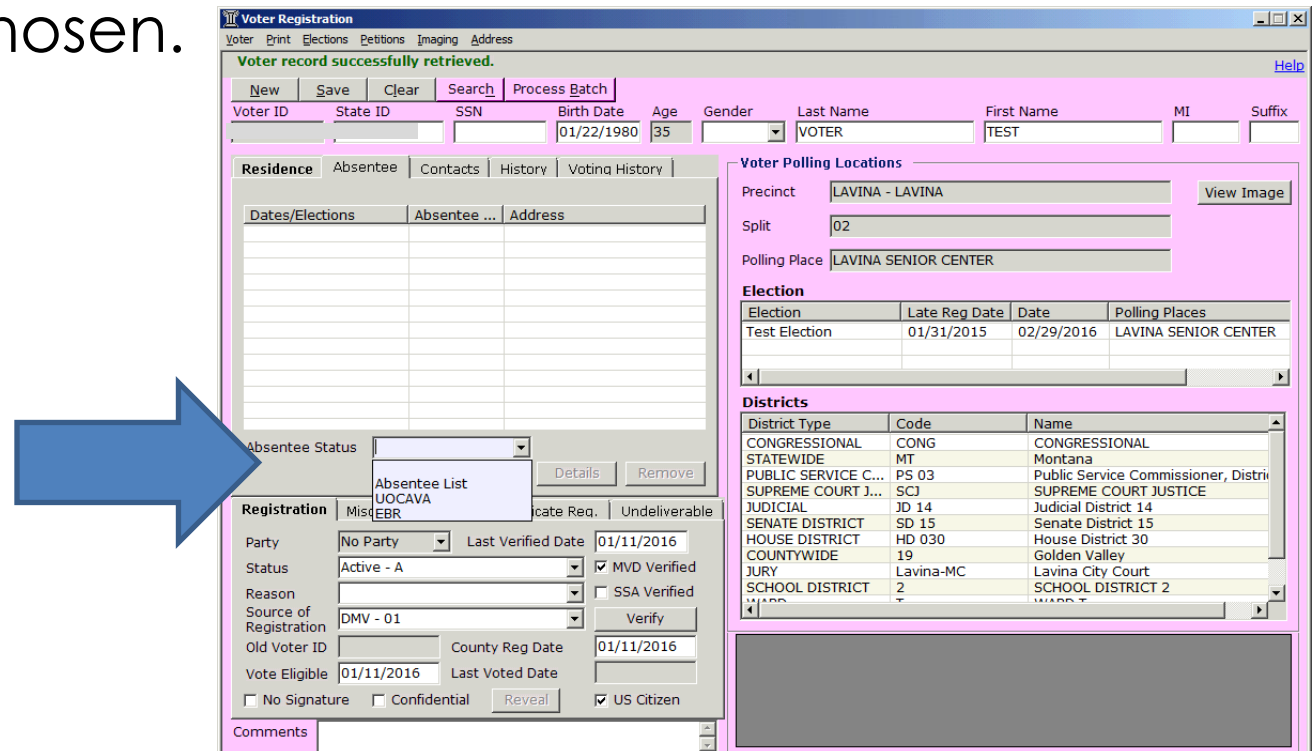
In September of 2015, EBR (electronic ballot request) Absentee Status was added to MT Votes for electronic ballots for voters with disabilities. At the time, Absentee Status was only required for EBR voters.

Absentee Tab

Solution:

To standardize the absentee process, users are now required to select an Absentee Status to add anything other than an Election Specific request.

Absentee Types are now directly related to the Absentee Status that is chosen.



The screenshot displays the 'Voter Registration' application window. The 'Absentee' tab is selected, showing a table with columns 'Dates/Elections', 'Absentee ...', and 'Address'. A blue arrow points to the 'Absentee Status' dropdown menu, which is currently set to 'UOCAVA'. Below this, the 'Registration' section contains various fields and checkboxes for voter information and verification.

Voter Registration
Voter Print Elections Petitions Imaging Address
Voter record successfully retrieved.

New Save Clear Search Process Batch

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

Residence Absentee Contacts History Voting History

Dates/Elections Absentee ... Address

Absentee Status **UOCAVA** Details Remove

Registration Mistake Req. Undeliverable

Party No Party Last Verified Date 01/11/2016

Status Active - A ☒ MVD Verified

Reason ☐ SSA Verified

Source of Registration DMV - 01 Verify

Old Voter ID County Reg Date 01/11/2016

Vote Eligible 01/11/2016 Last Voted Date

☐ No Signature ☐ Confidential ☒ US Citizen

Comments

Voter Polling Locations

Precinct LAVINA - LAVINA View Image

Split 02

Polling Place LAVINA SENIOR CENTER

Election

Election	Late Reg Date	Date	Polling Places
Test Election	01/31/2015	02/29/2016	LAVINA SENIOR CENTER

Districts

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 03	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 14	Judicial District 14
SENATE DISTRICT	SD 15	Senate District 15
HOUSE DISTRICT	HD 030	House District 30
COUNTYWIDE	19	Golden Valley
JURY	Lavina-MC	Lavina City Court
SCHOOL DISTRICT	2	SCHOOL DISTRICT 2

Absentee Tab

Voter Registration
Voter Print Elections Petitions Imaging Address

Voter record successfully retrieved.

New Save Clear Search Process Batch Help

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

00000011 01/22/1980 36 VOTER TEST

Absentee | Residence | Contacts | His

Dates/Elections Absentee ... A

Absentee Status Absentee List Add

Registration | Misc Info | Custom | Du | Last Ver

Party No Party Status Active - A Reason DMV - 01 Source of Registration Old Voter ID County Re Vote Eligible 01/01/2016 Last Voted Date

☐ No Signature ☐ Confidential Reveal ☒ US Citizen

Comments

Voter Registration - Absentee Detail

Absentee Type From To

Seasonal Absentee List Issue Method Issue Details

Date Requested Political Party

01/22/2016

☒ Use Address On File

3000 MAIN ST
HELENA, MT 59602

☐ Print Application

Absentee Address

Country UNITED STATES OF AMERICA ☒ USA ☐ EMAIL ☐ FAX

Address

City/St/Zip

Save and Issue Ballot Update and Save Close

Examples of adding a
Absentee List, Absentee
Status and a UOCAVA
Absentee Status.

Voter Registration
Voter Print Elections Petitions Imaging Address

Voter record successfully retrieved.

New Save Clear Search Process Batch Help

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

450146835 00000011

Absentee | Residence | Contacts

Dates/Elections Absentee

Absentee Status UOCAVA Add

Registration | Misc Info | Custom | Last Ver

Party No Party Status Active Reason DMV - 01 Source of Registration Old Voter ID County Reg Date 01/12/2016 Vote Eligible 01/01/2016 Last Voted Date

☐ No Signature ☐ Confidential Reveal ☒ US Citizen

Comments

Voter Registration - Absentee Detail

Absentee Type From To

Military Overseas 1 22 2016 1 31 2016

Civilian Overseas Military Overseas Military Domestic Issue Method Issue Details

Date Requested Political Party

01/22/2016

☒ Use Address On File

3000 MAIN ST
HELENA, MT 59602

☐ Print Application

Absentee Address

Country UNITED STATES OF AMERICA ☒ USA ☐ EMAIL ☐ FAX

Address

City/St/Zip

Save and Issue Ballot Update and Save Close

Absentee Tab

Reported Issue:

The EBR Absentee Status allowed a user to select any type of issue method.

Absentee Tab

Solution:

The user can now only select between email and EBRs as the issue method for EBR Absentee Status.

The screenshot displays the 'Voter Registration - Absentee Detail' form. The 'Issue Method' dropdown is set to 'E-mail EBRs', highlighted by a blue arrow. The 'Absentee Status' is set to 'EBR', also highlighted by a blue arrow. The form includes fields for 'Absentee Type' (set to 'Absentee List'), 'From' date (11/11/2016), 'To' date (11/31/2016), 'Absentee Application Source' (set to 'Mail'), 'Date Requested' (01/11/2016), 'Political Party', 'Issue Details', 'Use Address On File' (checked), 'Address' (10 MAIN ST, LAVINA, MT 59046), 'Print Application' (unchecked), 'Absentee Address' (Country: UNITED STATES OF AMERICA, Address: , City/St/Zip:), and 'Save and Issue Ballot', 'Update and Save', and 'Close' buttons. The left sidebar shows 'Residence' and 'Absentee' tabs, with 'Absentee' selected. The bottom left shows 'Registration' details including Party, Status, Reason, Source of Registration, Old Voter ID, Vote Eligible, and Signature/Confidentiality options.

Voter Registration - Absentee Detail

Absentee Type
Absentee List From 11/11/2016 To 11/31/2016

Absentee Application Source
Mail

Issue Method
E-mail EBRs

Issue Details

Date Requested 01/11/2016 Political Party

☒ Use Address On File

10 MAIN ST
LAVINA, MT 59046

☐ Print Application

Absentee Address

Country UNITED STATES OF AMERICA ☐ USA ☐ EMAIL ☐ FAX

Address

City/St/Zip

Absentee Status
EBR

Save and Issue Ballot **Update and Save** **Close**

Election Management

Election Management

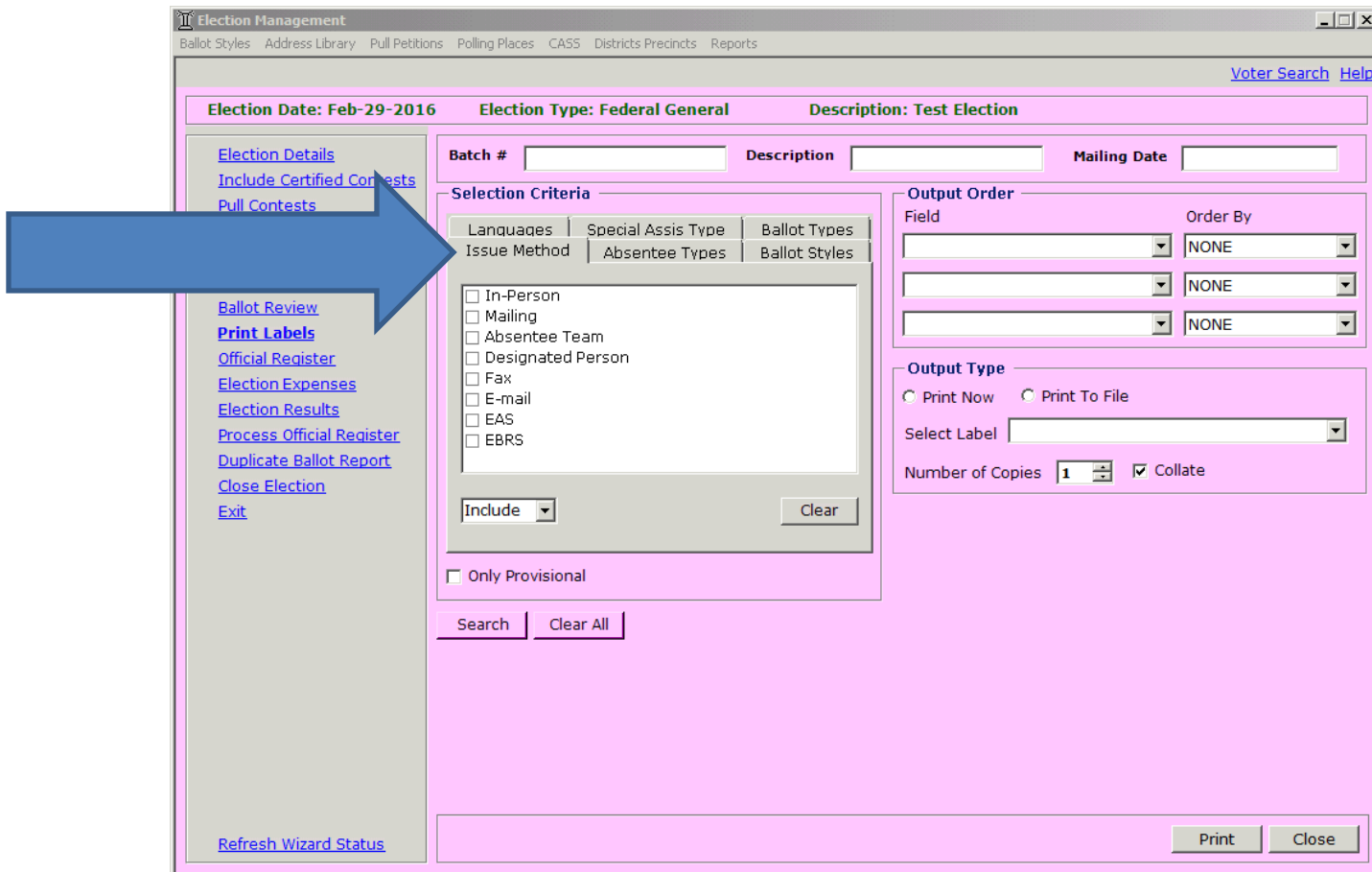
Reported Issue:

Since EBR is an Absentee Status, they can have an absentee type of 'Absentee List'. This means EBR voters would be pulled into the election with all of your Absentee List individuals, and their labels would be mixed in when you print labels, making it difficult to identify the EBR absentees.

Election Management

Solution:

You can now sort your label batch by Issue Method, which will allow you to quickly sort out your EBR~~S~~/Email ballots.



The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header displays 'Election Date: Feb-29-2016', 'Election Type: Federal General', and 'Description: Test Election'. A left sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. A blue arrow points from the 'Print Labels' link to the 'Issue Method' tab in the 'Selection Criteria' section. The 'Selection Criteria' section has tabs for 'Languages', 'Special Assis Type', 'Ballot Types', 'Issue Method', 'Absentee Types', and 'Ballot Styles'. The 'Issue Method' tab is active, showing a list of checkboxes: 'In-Person', 'Mailing', 'Absentee Team', 'Designated Person', 'Fax', 'E-mail', 'EAS', and 'EBRS'. Below this list is an 'Include' dropdown and a 'Clear' button. At the bottom of this section is an 'Only Provisional' checkbox. The 'Output Order' section on the right has three rows, each with a 'Field' dropdown and an 'Order By' dropdown, all currently set to 'NONE'. The 'Output Type' section has radio buttons for 'Print Now' and 'Print To File', a 'Select Label' dropdown, and a 'Number of Copies' spinner set to 1 with a checked 'Collate' box. At the bottom right are 'Print' and 'Close' buttons. A 'Search' button and a 'Clear All' button are located at the bottom of the 'Selection Criteria' section.

Election Management

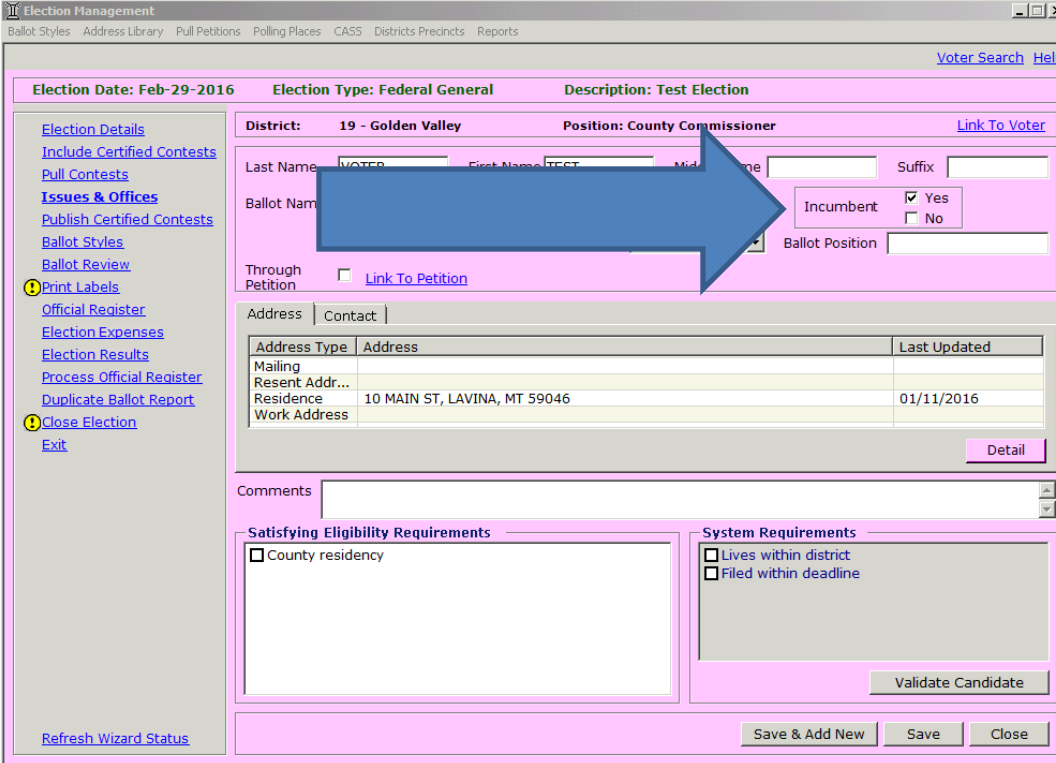
Reported Issue:

When the SOS extracted candidate information out of MT Votes for eSERS and ES&S, we could not determine which judicial candidates should have retention language. (Judicial candidates who are incumbents running unopposed require special retention language on the ballot.)

Election Management

Solution:

Add a required field of Incumbent when you enter candidates into MT Votes. The check box for incumbent was always there, but was not required. Now, you must select Yes or No.



The screenshot shows the 'Election Management' application window. The top navigation bar includes links for Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts/Precincts, and Reports. The main header displays the Election Date (Feb-29-2016), Election Type (Federal General), and Description (Test Election). A sidebar on the left contains a list of links: Election Details, Include Certified Contests, Pull Contests, Issues & Offices, Publish Certified Contests, Ballot Styles, Ballot Review, Print Labels, Official Register, Election Expenses, Election Results, Process Official Register, Duplicate Ballot Report, Close Election, and Exit. The main form area is divided into several sections. The top section shows the District (19 - Golden Valley) and Position (County Commissioner). Below this are fields for Last Name, First Name, Middle Name, and Suffix. A large blue arrow points to the 'Incumbent' checkbox, which is currently checked 'Yes'. Below the 'Incumbent' checkbox is the 'Ballot Position' field. The 'Through Petition' checkbox is unchecked, with a 'Link To Petition' link next to it. The 'Address' section contains a table with columns for Address Type, Address, and Last Updated. The table has four rows: Mailing, Resent Addr..., Residence (10 MAIN ST, LAVINA, MT 59046), and Work Address. The 'Last Updated' column shows 01/11/2016. Below the table is a 'Detail' button. The 'Comments' section has a text area. The 'Satisfying Eligibility Requirements' section has a checkbox for 'County residency'. The 'System Requirements' section has checkboxes for 'Lives within district' and 'Filed within deadline'. A 'Validate Candidate' button is located below these requirements. At the bottom of the form are buttons for 'Save & Add New', 'Save', and 'Close'. A 'Refresh Wizard Status' link is in the bottom left corner.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts/Precincts Reports

Voter Search Help

Election Date: Feb-29-2016 Election Type: Federal General Description: Test Election

District: 19 - Golden Valley Position: County Commissioner Link To Voter

Last Name: [VOTER] First Name: [TEST] Middle Name: [] Suffix: []

Ballot Name: [] Incumbent: ☒ Yes ☐ No

Ballot Position: []

Through Petition: ☐ Link To Petition

Address Contact

Address Type	Address	Last Updated
Mailing		
Resent Addr...		
Residence	10 MAIN ST, LAVINA, MT 59046	01/11/2016
Work Address		

Detail

Comments

Satisfying Eligibility Requirements

☐ County residency

System Requirements

☐ Lives within district

☐ Filed within deadline

Validate Candidate

Refresh Wizard Status

Save & Add New Save Close

Official Register

Reported Issue:

County A had printed their official registers. Two voters from that county then moved to County B and late registered. County A printed their supplemental registers which included these two voters as deletions. County A wrote **Deleted** on the signature line. The temporary workers thought that 'Deleted' was a signature and processed them as voted.

These two voters appeared to have voting history in two different counties even though they only voted in one county.

Official Register

Solution:

When processing the official register, you now will receive a notification if you try to process a voter who has moved out of your county.

The screenshot displays the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header area shows 'Election Date: Jan-31-2016', 'Election Type: Federal General', and 'Description: test'. On the left, a sidebar contains links for 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main content area is titled 'Official Register' and includes a dropdown menu for 'Official Register', a 'Polling Places' dropdown set to 'LAVINA SENIOR CENTER', a 'Barcode' field, and a 'Page No' field set to '47'. There are 'Accept' and 'Go To' buttons. Below this is a table with columns: 'Accepted', 'Voter Name', 'Residential Address', and 'Absentee Sent/Recd Date'. The table contains two rows: 'VOGEL, ROBERT' at '102 1ST ST E LAVINA, MT 59046' and 'VOTER, TEST' at '10 MAIN ST LAVINA, MT 59046'. A modal dialog box titled 'Moved Out of County' is open, displaying the message 'This voter has been moved to another county.' with an 'OK' button. The bottom of the window features a status bar with buttons for 'Print Processed Voters', 'Add Omitted Voters', 'First', 'Prev', 'Next', 'Last', and 'Page 47 of 50'. A checkbox labeled 'Process Completed' is also present.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts/Precincts Reports

[Voter Search](#) [Help](#)

Election Date: Jan-31-2016 Election Type: Federal General Description: test

Official Register: Official Register Polling Places: LAVINA SENIOR CENTER Barcode: Page No: 47

Accept Go To

Accepted	Voter Name	Residential Address	Absentee Sent/Recd Date
<input type="checkbox"/>	VOGEL, ROBERT	102 1ST ST E LAVINA, MT 59046	01/12/2016
<input checked="" type="checkbox"/>	VOTER, TEST	10 MAIN ST LAVINA, MT 59046	

Moved Out of County

This voter has been moved to another county.

OK

Print Processed Voters Add Omitted Voters First Prev Next Last Page 47 of 50

☐ Process Completed

[Refresh Wizard Status](#)

Provisional Ballot Module

Provisional Ballot Module

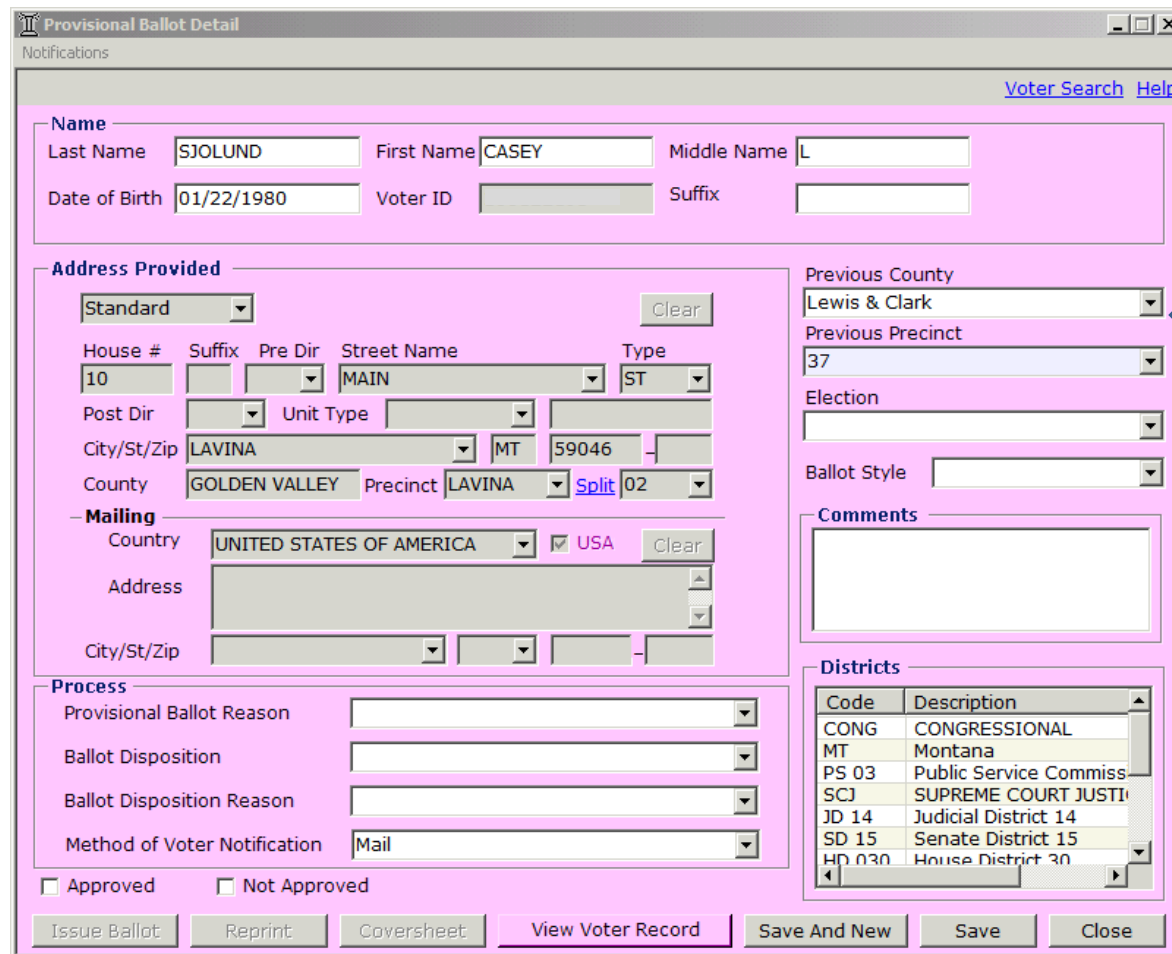
Reported Issue:

All counties do not consistently enter Previous County and Previous Precinct in the Provisional Ballot Module, which made it very difficult for other counties to Approve/Not Approve provisional voters from their county.

Provisional Ballot Module

Solution:

As long as voters have a Late Registration status and a reason of County to County or Precinct to Precinct, that data will now autofill in the provisional module.



The screenshot shows the 'Provisional Ballot Detail' form. A blue arrow points to the 'Previous County' dropdown menu, which is currently set to 'Lewis & Clark'. The form includes sections for Name, Address Provided, Mailing, Process, and Districts.

Name

Last Name: SJOLUND First Name: CASEY Middle Name: L

Date of Birth: 01/22/1980 Voter ID: Suffix:

Address Provided

Standard Clear

House #: 10 Suffix: Pre Dir: Street Name: MAIN Type: ST

Post Dir: Unit Type:

City/St/Zip: LAVINA MT 59046

County: GOLDEN VALLEY Precinct: LAVINA Split 02

Mailing

Country: UNITED STATES OF AMERICA USA Clear

Address:

City/St/Zip:

Process

Provisional Ballot Reason: Ballot Disposition: Ballot Disposition Reason: Method of Voter Notification: Mail

☐ Approved ☐ Not Approved

Districts

Code	Description
CONG	CONGRESSIONAL
MT	Montana
PS 03	Public Service Commiss
SCJ	SUPREME COURT JUSTI
JD 14	Judicial District 14
SD 15	Senate District 15
HD 030	House District 30

Buttons: Issue Ballot Reprint Coversheet View Voter Record Save And New Save Close

Provisional Ballot Module

Reported Issue:

Some counties were unnecessarily issuing provisional ballots for late registrants before election day.

Provisional Ballot Module

Solution:

If you attempt to issue a provisional ballot before election day, you will be prompted with a pop-up notifying the user that in most cases provisional ballots are only issued on election day. (You can still issue the provisional ballot if it is necessary.)

The screenshot shows the 'Provisional Ballot Detail' window. A warning pop-up is displayed in the center, stating: 'Provisional ballots are not issued until election day except in rare circumstances – proceed to issue provisional ballot?'. The pop-up has 'Yes' and 'No' buttons. A blue arrow points from the 'Yes' button to the 'Golden Valley' dropdown menu in the 'Address' section. The form contains the following sections:

- Name:** Last Name (L), Date of Birth.
- Address:** Standard, House # (1326), Suffix, Pre Dir, Street Name (WAUKESHA), Type (AVE), Post Dir, Unit Type, City/St/Zip (HELENA, MT, 59601), County (LEWIS & CLARK), Precinct (PCT 06), Split (P06.4).
- Mailing:** Country (UNITED STATES OF AMERICA), USA (checked), Address, City/St/Zip.
- Process:** Provisional Ballot Reason (County-to-County late registration in ele), Ballot Disposition, Ballot Disposition Reason, Method of Voter Notification (Mail).
- Comments:** Text area.
- Districts:** Table with Code and Description.

Code	Description
CONG	CONGRESSIONAL
MT	Montana
PS 05	Public Service Commis
JD 01	Judicial District 1
SCJ	SUPREME COURT JUSTI
SD 40	Senate District 40
HD 079	House District 79

Buttons at the bottom: Issue Ballot, Reprint, Coversheet, View Voter Record, Save And New, Save, Close.

Ballot Processing

Undeliverable Ballots

Reported Issue:

It was possible to inactivate voters from the Undeliverable Ballot Screen, even though the voter had to be sent a forwardable notice before being inactivated.

Undeliverable Ballots

Solution:

That checkbox has been removed to ensure that no voters are inactivated due to an undeliverable ballot without going through the NVRA confirmation process.

Undeliverable Ballots

Ballot has been received. [Help](#)

Batch

Election: 02/29/2016 Test Election Batch Description:

Batch Date: 01/11/2016 Received Date: 01/11/2016 Identifier:

Ballot Label

ID: [Add](#)

Ballot Search

Name:

Street: City: [Search](#)

Voter Details

Name on Ballot: Name in Record:

Status: Active Status:

Ballot Residential Address: Current Residential Address:

Ballot Mail Address: Address Type: Current Mail Address:

☐ Review Registration [Change Now](#)

[Delete](#) [First](#) [Previous](#) [Next](#) [Last](#) [View Ballots](#) [Voter Details](#) [Save](#) [Close](#)

Reports & Labels

Reports & Labels

Reported Issue:

If you reissued a ballot to a voter due to a residential address change, the EX-E01 and the E-001 Reports/Extracts in MT Votes showed the new address for both ballots.

Reports & Labels

Solution:

Fix these two reports to show the correct addresses for each ballot.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	VoterID	Tracking No	District/Precinct Name	BallotID	RegistrantName	DOB	Residential Address	Ballot Sent	Ballot Received	Precinct Code	Split	Ballot Style	Voter S
2	4	2	PCT 19	453766751	VOTER,TEST	1/22/1980	3000 MAIN ST, HELENA, MT 59602	1/12/2016		P19	P19.3	20	Active
3	4	1	PCT 06	453766750	VOTER,TEST	1/22/1980	1326 WAUKESHA AVE, HELENA, MT 59601	1/12/2016		P06	P06.4	33	Active
4													
5													

Ballot Style	Ballot Stage/Status	Tracking Number	Registrant Name/Designated Person	Precinct	Ballot Sent
Ballot Number	Ballot Status Reason	Voter ID	Date of Birth	Split	Ballot Received
Ballot ID	Ballot Type	Voter Status	Residential Address	Party	
Absentee Type	Ballot Issue Reason	Reason	Send To		
			Resent Address		Resent Date
					Comments

Precinct	PCT 06				
33	Sent/Void	1	VOTER,TEST	P06	01/12/2016
1			01/22/1980	P06.4	
453766750	Original	Active	1326 WAUKESHA AVE, HELENA, MT 59601	No Party	
Election Specific			1326 WAUKESHA AVE , HELENA MT 59601		
20	Sent	2	VOTER,TEST	P19	01/12/2016
1			01/22/1980	P19.3	
453766751	Reissued	Active	3000 MAIN ST, HELENA, MT 59602	No Party	
Election Specific			3000 MAIN ST , HELENA MT 59602		

Reports & Labels

Reported Issue:

Counties requested that the Ballot Source be added as a sort option on the BP-034 Report.

Reports & Labels

Solution:

The BP-034 can now be sorted by Ballot Source.

Reports Voter Search Help

County Golden Valley **Election** Mill levy increase - 05/05/2015

Districts ☐ All (Deleted districts will be included on report)

- ☐ CONGRESSIONAL - CONG
- ☐ Golden Valley - 19
- ☐ House District 30 - HD 030
- ☐ Judicial District 14 - JD 14
- ☐ Lavina City Court - Lavina-MC
- ☐ LAVINA CITY WIDE DIST - CL_LVNA
- ☐ Montana - MT

Batch Number ☐ All

- ☒ 3
- ☒ 4
- ☒ 5
- ☒ 6
- ☐ 7
- ☐ 8
- ☐ 9

Precincts ☒ All (Deleted precincts will be included on report)

- ☐ LAVINA - LAVINA
- ☐ RYEGATE - RYEGATE

☐ Processed Date and Time (Not valid for processed ballots before 07/15/2012)

From HH:MM:SS AM

To HH:MM:SS PM

☐ **Received Range**

From

To

Ballot Stage ☐ All

- ☐ Prepared
- ☐ Sent (not returned)
- ☒ Received/Processed
- ☐ Undeliverable

Ballot Style ☐ All Ballot Styles

- ☐ 1

Ballot Status ☒ All

- ☐ Accepted
- ☐ Rejected
- ☐ Void

Select Report

Code	Name
BP-023	Ballot Style Key
BP-026	Ballot Statistics for Return by Date and Source
BP-028	Ballot Proofing - By Precinct, Splits And Styles
BP-031	Batch Exception List Report
BP-034	Ballot Stage/Status in Date Range
BP-035	Undeliverable Ballot Labels
BP-036	Ballots Preventing Election Certification
BP-037	Seasonal Absentee Report
BP-038	Ballot Status Change

Sort Order

- BALLOT SOURCE
- PRECINCT
- BALLOT-STYLE
- BALLOT-SEQUE...
- LAST-NAME
- FIRST-NAME
- MIDDLE-NAME
- BALLOT STAGE

Folder

Coming later this month

Currently, if a new or transfer voter's driver's license number does not verify in MT Votes, or if the ID# is a partial SSN you have to leave MT Votes and go to another web service to verify the ID number.

The voter verify system has been incorporated into MT Votes. Now, if a voter's driver's license number does not verify through the internal MT Votes check, or if the ID# is a partial SSN, a web service will automatically run the voter verify check.

You do not leave MT Votes for this service. You can run multiple variations in the search like you do now.

You can also access the voter verify service from the MT Votes home screen menu if necessary, rather than from the voter's record.

Coming later this month

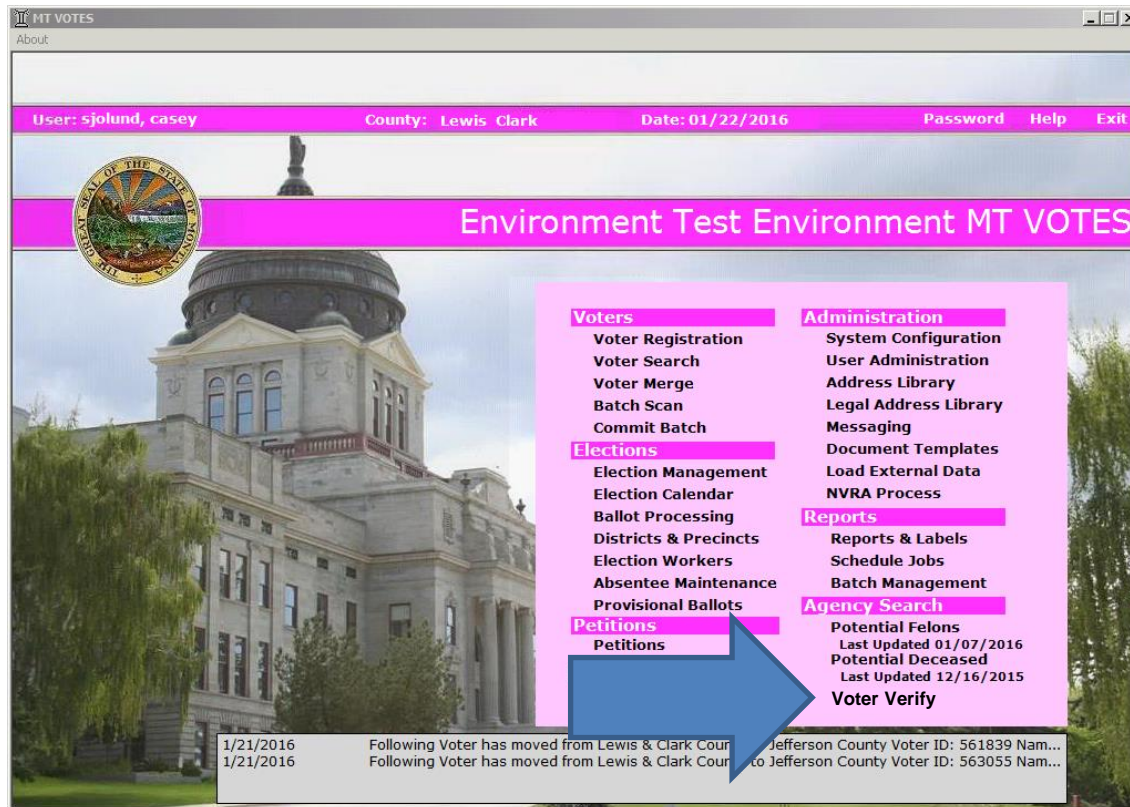
If MT Votes can not automatically verify the voter, you will be prompted with a Verification search box, much like our current Voter Verify process. The search box will allow you to enter new data and **Search Again**, exit the search through the **No Match** button and select the record as a **Match** if the information is verified.

The screenshot shows a web application window titled "Voter Verify". Inside, there is a "Search" section with the instruction "Fields marked with an * are required". It contains five input fields: "* First Name", "* Last Name", "* Date of Birth", "Drivers License #", and "Last 4 Digits of SSN". The "Last Name" field is also labeled with "* and / or". To the right of the input fields is a "Search Tip" section that reads: "To search for a voter registration applicant's or voter's information, enter the information in the fields and click 'Search' for your results." Below the input fields are three buttons: "Match", "Search Again", and "No Match". A circular arrow icon is located to the left of the "Drivers License #" field.

Coming later this month

You will be able to access a stand-alone Voter Verify Module from the MT Votes home screen under the Agency Search.

Using this module will not change a voter record, it will only notify you if the information you enter is verified.



January 2016 Release

You can see all items and that were in this release by going to the About > Release Notes Section of MT Votes.

THANK YOU!

METAC is a **big** time commitment. We really appreciate all of the effort put forward by each member of METAC. We know it's not always a fun and easy process.

Audrey, Bonnie, Bret, Charlotte, Jody, Kathie, Sandi and Vickie, **Thank you!**